

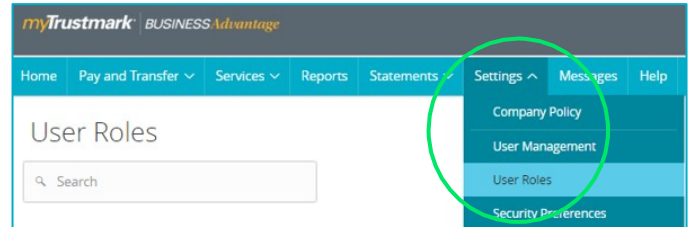
# User Roles

Business Online Banking Brought to You by *myTrustmark*® Business



Each User Role controls feature entitlements and dollar limits for one or more company users with like roles.

1. Select **Settings** and then select **User Roles**.



## To create a user role:

1. Select **Create Role** to add a new user role and then select **Continue**.

## To edit a user role:

1. Select the **Pencil icon** to edit the user role.
2. Select the **Double Paper** icon to copy the user role.
3. Select the **Trash** box to delete the user role.

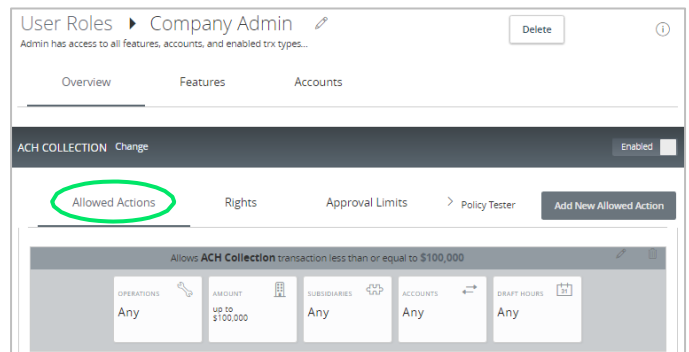


2. Select a **Transaction Type** by clicking on the name of the transaction type.

Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft Actions Max	Approve Actions Max	Cancel Actions Max	View
ACH Collection	\$100	100 / \$100	100 / \$100	100 / \$100	1 Any	1 Any	1 Any	

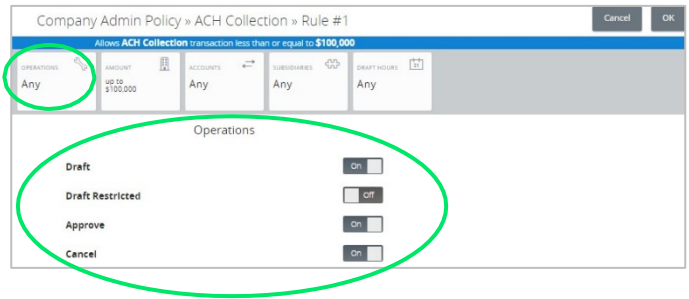
## Allowed Actions

One or multiple levels may be setup to establish general or granular user limitations.

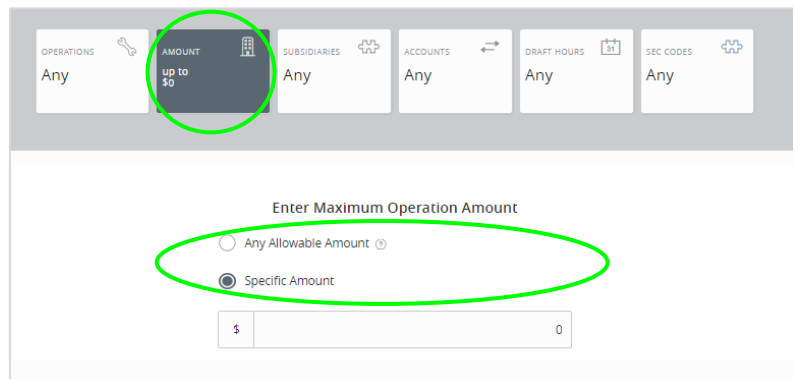


3. Select the **Operations** box. Specify the allowed operation(s) for the selected transaction type.

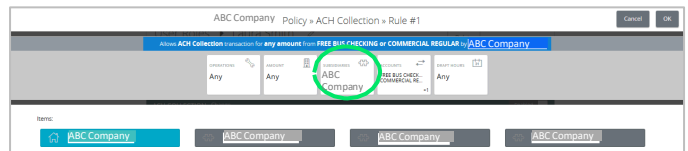
- a. **Draft** allows a user to initiate a transaction.
- b. **Draft Restricted** allows a user to only access an assigned ACH or Wire template. Adding new templates, creating one-time payments and recipient maintenance is not allowed.
- c. **Approve** allows a user to authorize a transaction.
- d. **Cancel** allows a user to cancel a draft transaction.



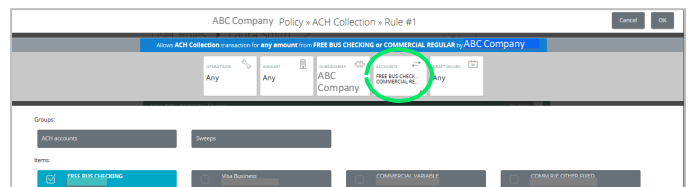
4. Select the **Amount** box. Select either **Any Allowable Amount** or **Specific Amount** to key in a specific dollar limit.



5. Select the **Subsidiaries** box. Choose the subsidiaries allowed for this transaction type.

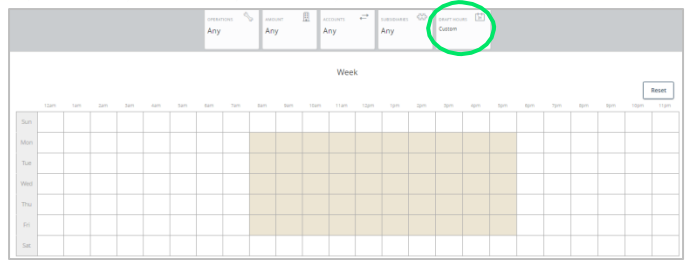


6. Select the **Accounts** box. Choose the account(s) allowed for this transaction type.

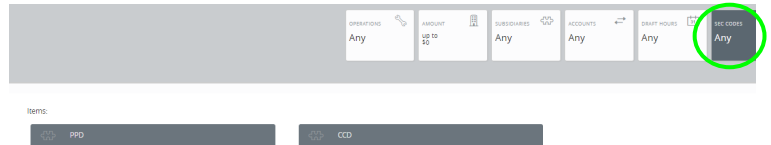


- (Optional) Select the **Draft Hours** box. Choose the days and hours allowed for this transaction type.

NOTE: Select the days of the week in grey and the hours of the day across the top to indicate days and hours for the transaction. Individual time slots can also be selected.

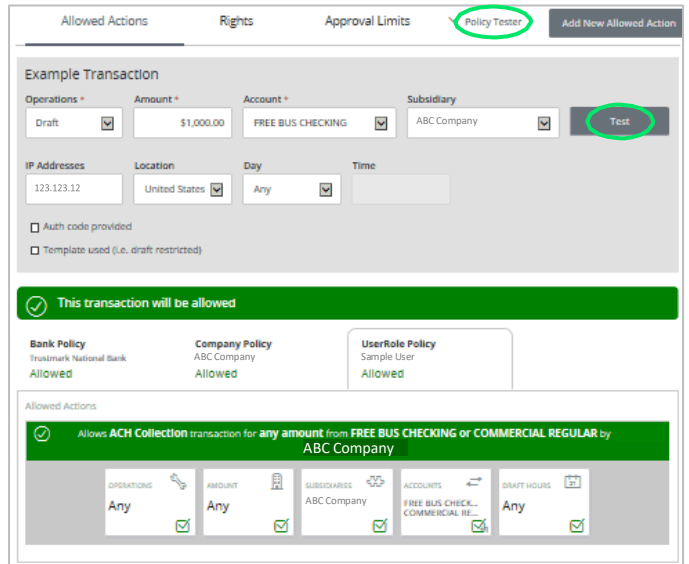


- (Optional) Select the **SEC Codes** box. Choose the allowed codes.



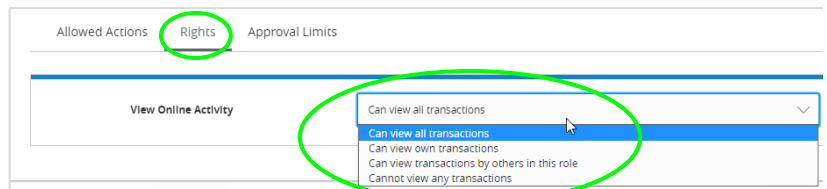
- (Optional) Select the **Policy Tester** to validate the User Role functionality to assure the setup is as needed.

Enter the desired transaction details and select **Test**.

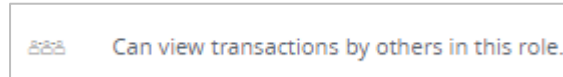
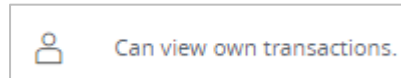
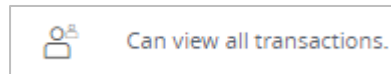


## Rights

- Select the appropriate **Rights** for the user role's ability to view transactions in the Activity Center by selecting from the drop-down menu.



- a. Can view all transactions – User can view transactions initiated by any online banking user within the company.
- b. Can view own transactions – User can only view the user’s own transactions.
- c. Can view transactions by others in this role – User can view transactions initiated by users who are assigned to the same user role.
- d. Cannot view any transactions – User cannot view any transactions.



11. Select the **Approval Limits** tab to view and modify the dollar and count limits assigned by Trustmark.

**Maximum Amount**

Per Transaction	Maximum dollar amount for an individual transaction
Per Account Per Day	Maximum dollar amount per day allotted for each entitled account
Per Day	Maximum dollar amount per day allotted for the user (regardless of the account)

**Maximum Count**

Per Account Per Day	Maximum number of transactions per day allotted for each entitled account
Per Day	Maximum number of transactions per day allotted for the user (regardless of the account)
Per Month	Maximum number of transactions per month allotted for the user (regardless of the account)

Allowed Actions   Rights   **Approval Limits**

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Maximum Amount ⓘ

Per transaction    \$

Per Account Per Day    \$

Per Day    \$

Per Month    \$

Maximum Count ⓘ

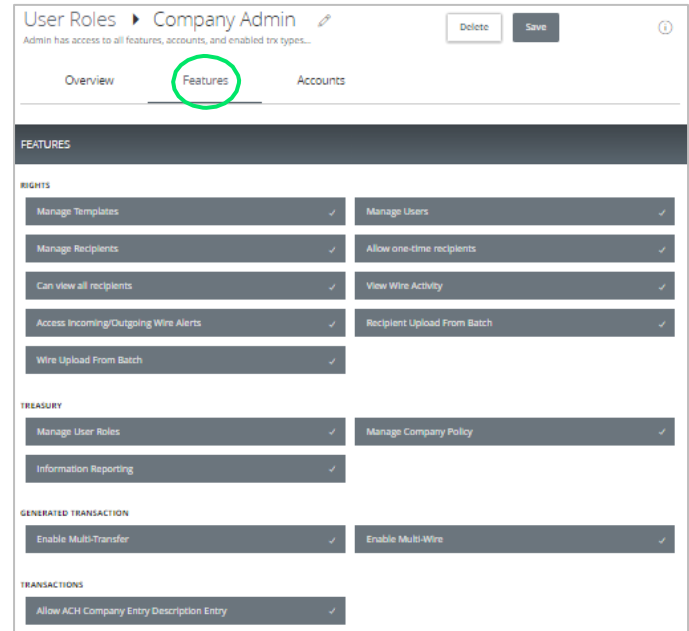
Per Account Per Day   

Per Day   

Per Month

## Features

12. Select the **Features** tab to view and modify non-transactional features. Select features to enable or disable.



## Accounts

13. Select the **Accounts** tab to view and modify the account entitlements by selecting  or  under **View**, **Deposit** or **Withdraw**.

NOTE: **Show unassigned accounts** allows the user to view accounts without any view, deposit or withdrawal access.

14. Save the User Role by selecting the **Save** button.
15. Select **Overview** and repeat steps 4-13 for each transaction type.

The screenshot shows the 'Accounts' interface. A table lists accounts with columns for 'View', 'Deposit', and 'Withdraw'. A 'Show unassigned accounts' link is circled in green.

Number	Name	View	Deposit	Withdraw	Labels
Account #	PERS NON INT SAV	✓	✓	✓	
Account #	PERS DAILY INT SAV	✓	✓	✓	
Account #	UMBRELLA CHECKING	✓	✓	✓	



Access is disabled, but can be enabled.



Access is disabled for the company and cannot be enabled.



Access is enabled.